

Step-By-Step Instructions: How to Run Cognos Reports

Overview

This guide contains instructions on how to access and run financial reports by categories (account rollups) in Cognos cloud application on an annual, quarterly, monthly, and five-year trend basis. Please note, financial information in Cognos is retrieved directly from Banner into Cognos daily overnight. Access to financial information is restricted to your specified Banner Access Authorization.

Reports Usage

In the following step-by-step instructions, you will learn how to run executive level reports to conduct the following type of performance analysis:

- Operations Analysis
- Budget Variance Analysis
- Year-Over-Year Analysis
- Vertical and Horizontal Analysis
- COGS Analysis
- Contribution Margin Analysis

Additional Assistance

For additional assistance or training please email fp&a@westernu.edu.

Sections:

- 1 • Accessing Cognos Reports
- 2 • Running YTD Budget Vs Actual Performance Analysis
- 3 • Running YTD Budget Vs Actual Performance Analysis (Encumbrance)
- 4 • Running YTD Quarterly Performance Analysis
- 5 • Running Monthly Performance Analysis
- 6 • Running Five Year Trend
- 7 • Exporting Reports to PDF and Excel
- 8 • E-mailing Report

Section 1: Accessing Cognos Reports

Step 1: Go to: <http://demeter.westernu.edu/cognos10>

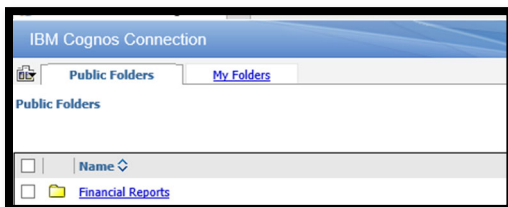
Step 2: Enter Banner User ID and Password. Click 'OK'.



Step 3: Click 'IBM Cognos content'



Step 4: Click 'Financial Report' folder



Section 2: Running YTD Budget Vs Actual Performance Analysis

Step 1: Click 'YTD Budget Vs Actual Performance Analysis'



Step 2: Select 'Fiscal Year' (2016-2021)

Step 3: Select 'Fiscal Period' (1-14)

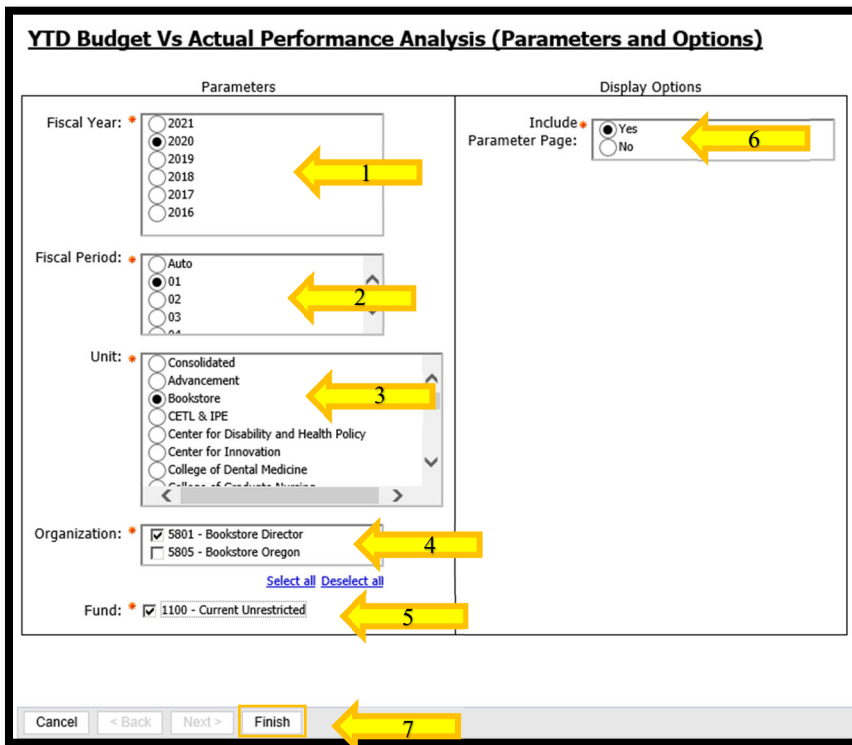
Step 4: Select 'Units' (or Consolidated)

Step 5: Select 'Organization' (Org(s))

Step 6: Select 'Fund'

Step 7: Select 'Include Parameter Page' (This is an extra page that will list the parameters selected)

Step 8: Click 'Finish'



YTD Budget Vs Actual Performance Analysis (Parameters and Options)

Parameters	Display Options
Fiscal Year: * <input type="radio"/> 2021 <input checked="" type="radio"/> 2020 <input type="radio"/> 2019 <input type="radio"/> 2018 <input type="radio"/> 2017 <input type="radio"/> 2016	Include Parameter Page: * <input checked="" type="radio"/> Yes <input type="radio"/> No
Fiscal Period: * <input type="radio"/> Auto <input checked="" type="radio"/> 01 <input type="radio"/> 02 <input type="radio"/> 03	
Unit: * <input type="radio"/> Consolidated <input type="radio"/> Advancement <input checked="" type="radio"/> Bookstore <input type="radio"/> CETL & IPE <input type="radio"/> Center for Disability and Health Policy <input type="radio"/> Center for Innovation <input type="radio"/> College of Dental Medicine <input type="radio"/> College of Graduate Studies	
Organization: * <input checked="" type="checkbox"/> 5801 - Bookstore Director <input type="checkbox"/> 5805 - Bookstore Oregon Select all Deselect all	
Fund: * <input checked="" type="checkbox"/> 1100 - Current Unrestricted	

Cancel < Back Next > **Finish**

Section 2: Running YTD Budget Vs Actual Performance Analysis

Step 9: The report will display.

Western University of Health Sciences					
Blank					
YTD Budget Vs Actual Performance Analysis					
	Adjusted Budget (FY2021)	Adjusted Budget (07/01/20 - 09/30/20)	Actual (07/01/20 - 09/30/20)	Budget vs. Actual Variance (\$)	Variance (%)
Revenues					
Equipment Fees					
Student Fees					
Student Tuition					
Tuition & Fee Revenues					
Advancement Revenues					
Auxiliary Revenues					
Grants and Contracts					
Net Patient Care Services Revenues					
Other Revenues					
Revenues					
Expenses					
Exempt Administrative					
Faculty					
Non-Exempt Administrative					
Other Compensation					
Salaries and Wages					
Fringe Benefits					
Compensation Expenses					

Step 10: Navigate using the icons at the bottom of the page [Top](#) [Page up](#) [Page down](#) [Bottom](#)

Report Parameter List	Keep this version Add this report
Fiscal Year: 2020	
Period: 01	
Unit: Bookstore	
Orgs: 5801	
Funds: 1100	

Section 3: Running YTD Budget Vs Actual Performance Analysis (With Encumbrances)

Step 1: Click 'YTD Budget Vs Actual Performance Analysis (Encumbrance)'



Step 2: Select 'Fiscal Year' (2016-2021)

Step 3: Select 'Fiscal Period' (1-14)

Step 4: Select 'Units' (or Consolidated)

Step 5: Select 'Organization' (Org(s))

Step 6: Select 'Fund'

Step 7: Select 'Include Parameter Page' (This is an extra page that will list the parameters selected)

Step 8: Click 'Finish'

The screenshot shows the 'YTD Budget Vs Actual Performance Analysis (Parameters and Options)' form. It is divided into two main sections: 'Parameters' and 'Display Options'. The 'Parameters' section includes fields for 'Fiscal Year', 'Fiscal Period', 'Unit', 'Organization', and 'Fund'. The 'Display Options' section includes an 'Include Parameter Page' checkbox. Yellow arrows with numbers 1 through 7 point to the following elements: 1. Fiscal Year dropdown (2020 selected); 2. Fiscal Period dropdown (01 selected); 3. Unit dropdown (Bookstore selected); 4. Organization checkboxes (5805 - Bookstore Oregon selected); 5. Fund dropdown (1100 - Current Unrestricted selected); 6. Include Parameter Page checkbox (Yes selected); 7. Finish button.

Section 3: Running YTD Budget Vs Actual Performance Analysis (With Encumbrances)

Step 9: The report will display.

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YTD Budget Vs Actual Performance Analysis (Encumbrance)

	Adjusted Budget (FY2020)	YTD	Encumbrance	Total Actual	Budget vs. Actual Variance (\$)	Variance (%)
Revenues						
Equipment Fees						
Student Fees						
Student Tuition						
Tuition & Fee Revenues						
Advancement Revenues						
Auxiliary Revenues						
Grants and Contracts						
Net Patient Care Services Revenues						
Other Revenues						
Revenues						
Expenses						
Exempt Administrative						
Faculty						
Non-Exempt Administrative						
Other Compensation						
Salaries and Wages						
Fringe Benefits						
Compensation Expenses						

Step 10: Navigate using the icons at the bottom of the page

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IBM Cognos Viewer - YTD Budget Vs Actual Performance Analysis (Encumbrance)

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 [Add this report](#)

Report Parameter List

Fiscal Year: 2020

Period: 01

Unit: Bookstore

Orgs: 5805

Funds: 1100

Step 1: Click ‘YTD Quarterly Performance Analysis’



Step 2: Select ‘Fiscal Period’ (2016-2021)

Step 3: Select ‘Fiscal Period’ (1-14)

Step 4: Select ‘Units’ (or Consolidated)

Step 5: Select ‘Organization’ (Org(s))

Step 6: Select ‘Fund’

Step 7: Select ‘Include Parameter Page’ (This is an extra page that will list the parameters selected)

Step 8: Click ‘Finish’